BILL OF TRANSFER
AND NOTICE OF ASSIGNMENT

The undersigned, as Grantors of The John Doe and Jane Doe Living Trust, hereby transfer and assign to John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust, all of our rights, title and interest in the assets described below:

[This section varies based upon what type of property you include in your Living Trust.]

A. <u>The following shared property</u>:

The real property located at:

- 123 Main Street
  Philadelphia, Pennsylvania 19102
  Type of Property: Home

The following financial accounts:

- XYZ Bank
  Account Number: 11111
  Account Type: Checking

Proceeds from the following life insurance policies:

- XYZ Life Insurance Company, Term Life insurance
  Policy Number: 11111

The following additional property:

- All personal property, including but not limited to jewelry, household furniture and furnishings, clothes and other personal items

B. <u>The following separate property of John Doe</u>:

The following additional property:

- All personal property, including but not limited to jewelry, household furniture and furnishings, clothes and other personal items

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C. The following separate property of Jane Doe:

The following additional property:

- All personal property, including but not limited to jewelry, household furniture and furnishings, clothes and other personal items

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IN WITNESS WHEREOF, the undersigned have executed this Bill of Transfer and Notice of Assignment on the date below.

_____
Signature of John Doe, as Grantor

Date: _____

_____
Signature of Jane Doe, as Grantor

Date: _____

_____
Signature of John Doe, as Trustee of The John Doe and Jane Doe Living Trust

Date: _____

_____
Signature of Jane Doe, as Trustee of The John Doe and Jane Doe Living Trust

Date: _____

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[This document only appears if you are transferring a financial account to your trust.]

FINANCIAL ACCOUNT TRANSFER TO TRUST

To: XYZ Bank

Re: Checking Account Number(s): 11111

Ladies and Gentlemen:

Please be advised that we are the grantors of a living trust and have transferred all of our rights, title and interest in the above-referenced account(s) to John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust.

Please make note of this transfer and update your records such that the above-referenced account(s) is/are registered in the name of "John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust." Please do not change the account number(s).

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

123 Main Street
Philadelphia, Pennsylvania 19102

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[This document only appears if you want to include proceeds of your life insurance in your trust.]

REQUEST TO CHANGE BENEFICIARY FOR LIFE INSURANCE

To: XYZ Life Insurance Company

Re: Term Life insurance
Policy Number: 11111

Ladies and Gentlemen:

Please be advised that we are the Grantors of a living trust and would like to make the living trust the beneficiary of our life insurance policy or annuity contract as the case may be.

Please make "John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust" the beneficiary of our policy.

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

123 Main Street
Philadelphia, Pennsylvania 19102

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